Job Aid:

How to Create a Master Blanket Purchase Order (MBPO) for an Awarded Bid: Single Vendor

This Job Aid shows how to:

- Find and open an evaluated and awarded COMMBUYS Bid
- Create a Master Blanket Purchase Order (Contract) for an awarded Bid in COMMBUYS

Of Special Note:

Once the solicitation process is complete and the bid is awarded to a vendor(s) a MBPO for a new contract needs to be created in COMMBUYS. This job aid starts at the point where the bid has been awarded and approved. This Job Aid is only for a one vendor per MBPO, if you have a contract with multiple vendors and require quotes for each execution of the contract then you need to follow the Create a Multi-Vendor MBPO Job Aid.
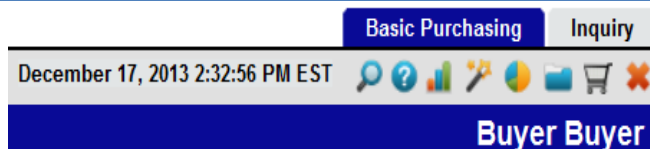
Screenshot	Directions
	1. Launch the COMMBUYS URL. Type https://www.commbuys.com/bso/ in the Browser. Enter your Login ID and password and click the **Login** button on the COMMBUYS landing page.

| Screenshot	Directions
	2. If you have multiple roles in COMMBUYS select the Basic Purchasing role on the upper right side of the home page. If users have only one role, no user role tabs display.
	3. Go to your **Control Center** to locate the awarded bid. The bid must have you listed as the purchaser or you need the appropriate COMMBUYS privileges. Click **Bids > Approved** and a list of available bids will display. Note: In this example, there are three bids in the Control Center. Two bids are ready for conversion to a **Blanket** purchase order.
	4. Another way to locate a bid not assigned to you and is ready for purchasing, select **Documents > Bids > Approved** from the Navigation bar.
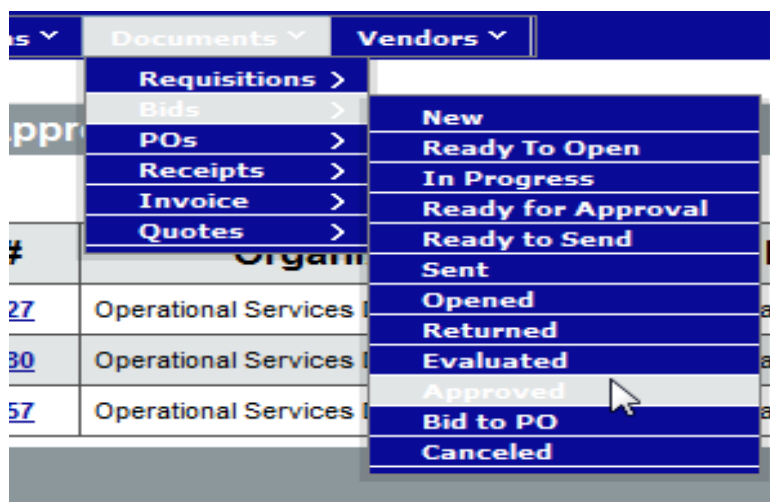
Screenshot	Directions

| | 5. Bids assigned to your user id display first. |

Bids - Approved

Bid(3)

Bid #	Organization	Buyer	Description
00000127	Operational Services Division	Linda Banks-Grant	test approval
00000080	Operational Services Division	Linda Banks-Grant	restock items
00000057	Operational Services Division	Linda Banks-Grant	Dog Food for Shelter

Click **View All** to view the complete list to select a bid not assigned to your user id.

Click on the **Bid #** blue hyperlink to open an approved Bid.

Bids - Approved

Bid(8)

Bid #	Organization	Buyer	Description	Purchase Method
00000127	Operational Services Division	Linda Banks-Grant	test approval	Open Market
00000099	Operational Services Division	Administrator System	DOT-ENTTIME-FY13-001 Enterprise Time and Atteendance Solution Planning	Open Market
00000082	Operational Services Division	Administrator System	solicitaiton from solicitaiton enabled blanket test	Open Market
00000081	Operational Services Division	Administrator System	Medical Marijuana Program Coordination	Blanket
00000080	Operational Services Division	Linda Banks-Grant	restock items	Blanket
00000057	Operational Services Division	Linda Banks-Grant	Dog Food for Shelter	Blanket
00000025	Operational Services Division	Eileen Honen	Pet sitting services	Blanket
00000007	Operational Services Division	Administrator System	Abrasives	Open Market

Note: Open Market bids can be changed to Master Blankets; however they are typically used for a one time bid that will most likely not result in a contract.

| | 6. The Bid opens to the **Summary** tab. |

| Bid Tab | Cancel Bid | Clone Bid | View Quote History | Print |

Scroll to the bottom of the page and click the **Bid Tab** button.

| | 7. The **Bid Tabulation** page displays all the Quotes received for the selected bid. |

Bid Tabulation for Bid #BD-14-1080-1080C-1080L-00000000212

Quotes | Revisions | Items | Header Questions | Subcontractors | Routing | Attachments | Score | Summary | Back to Bid

Total Number of Submitted Quotes: 9

Quote #	Description	Vendor ID	Vendor Name	Submit Date	View Quote
QT-1080-OSD01-OSD10-0000000066	Bid for Vendor 2	00002157	TOMVendor9	06/10/2014 03:28:01 PM	View Quote
QT-1080-OSD01-OSD10-0000000063	Bid for Vendor	00000267	Barker Steel LLC / Harris Rebar	07/03/2014 09:45:00 AM	View Quote
QT-1080-OSD01-OSD10-0000000070	Bid for Vendor	300125	B & B Engineering	06/10/2014 09:52:00 AM	View Quote
QT-1080-OSD01-OSD10-0000000073	Bid for Vendor	235372	Bank of America	06/10/2014 10:00:00 AM	View Quote
QT-1080-OSD01-OSD10-0000000074	Bid for Vendor	204994	Bacher Corporation	06/09/2014 10:06:00 AM	View Quote
QT-1080-OSD01-OSD10-0000000075	Bid for Vendor	00001174	K and M Communications	06/09/2014 10:10:00 AM	View Quote
QT-1080-OSD01-OSD10-0000000076	Bid for Vendor	00001175	E Alves Cleaning Service	06/09/2014 10:23:00 AM	View Quote
QT-1080-OSD01-OSD10-0000000078	Bid for Vendor	00000958	J & E Mechanical Corp	06/09/2014 10:28:00 AM	View Quote
QT-1080-OSD01-OSD10-0000000079	Bid for Vendor	222929	Jack Young Company, Inc	06/02/2014 11:57:00 AM	View Quote

Create New Quote

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Click the **Summary** tab.

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Screenshot	Directions
	8. The **Summary** tab for the bid opens. Scroll to the bottom of the page and click **Create PO**. **Note:** The Create PO button will only appear if the Bid has been awarded.
	9. The Purchase Order Creation Preview page displays with the purchase order creation options, which are already preselected: • Include Narrative Items • Include Bid Attachments • Include Bid Tab Attachments • Include Bid Notes • Include Quote Subcontractors • Include Vendor Quote Attachments • Include Forms Keeping all checked will carry over from the Bid to the Master Blanket. Click **Continue** to create the MBPO.
	10. The page refreshes with the purchase orders created from the bid, one for each Vendor awarded. You can open either PO by click the **PO #** or you can click **OK** to return to the MBPOs at a later date. If you click the PO #, skip to step 13. ***Note: Purchase Order #s are generated, different from the Bid #.***
	11. Click **POs > In Progress** from your Control Center to view the newly created purchase orders. Click on the **Purchase Order #** blue hyperlink to open the desired Purchase order.

Screenshot	Directions

12. The PO 'In Progress' opens to the General Tab; any and all edits can be made.

All information from the Bid was converted into the MBPO, however if edits need to made click through each tab to make the appropriate changes.

- The Items tab will be the MBPO catalog, if a detailed and long item list is desired you will need to reach out to OSD and the Helpdesk for assistance.

On the **General Tab** make sure the following is correct:

Short description: a searchable field; your departmental numbering schema here

Release Type:
- **Direct Release**: a single vendor blanket with specific pricing, select if you would like the order (PO) to be ready to send to the vendor once the requisition is approved
- **Standard Release**: used for any blanket with or without pricing, select if you would like the order (PO) to require an second approval for the PO or you would like to request quotes from the vendor(s) on the MBPO
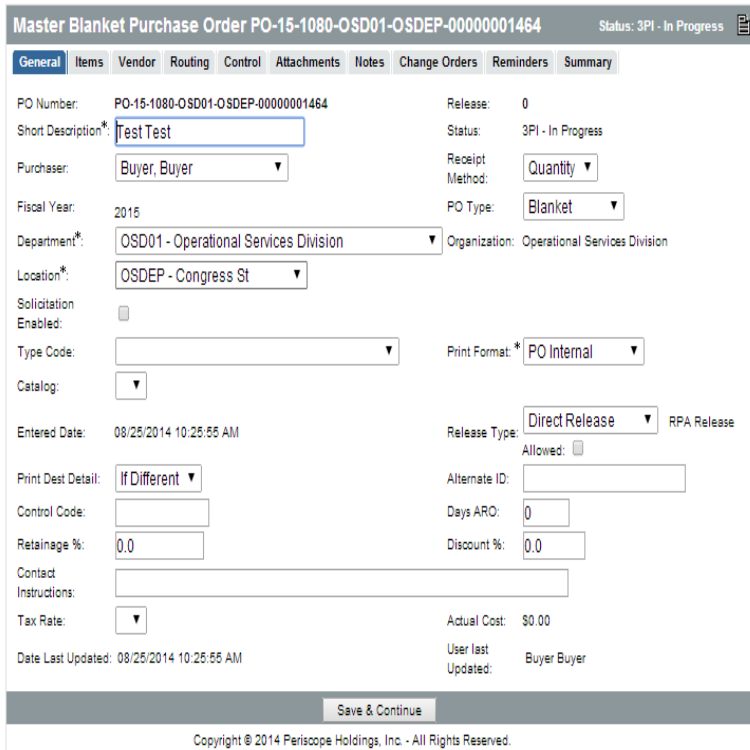
If the blanket will serve as a multi-vendor contract used for conducting Bids to get pricing for specific orders, be sure to select **Solicitation-Enabled** and instruct users to create **Solicitation Enabled release requisitions** when ordering from this contract.
- Multi-Vendor based blankets require "Standard Release"
- In some cases, departments may choose not to check off "Solicitation Enabled" on a distributor blanket. One example of such a contract is a true distributor situation, where all the vendors are selling the same products at the same pricing.

Type Code dropdown:
- **SW-**statewide Contract
- **NC-**Non-statewide Contract (most departmental contracts)

Next go to the **Control Tab**

Screenshot	Directions
Master Blanket Purchase Order PO-15-1080-OSD01-OSDEP-00000001464 Status: 3PI - In Progress General Items Vendor Routing **Control** Attachments Notes Change Orders Reminders Summary Master Blanket/Contract Begin Date*: 08/27/2014 🗓 Master Blanket/Contract End Date*: 08/31/2016 🗓 Cooperative Purchasing Allowed ☐ Organization Department Dollar Limit Dollars Spent to Date Minimum Order Amount Delete ☐ 1080 - Operational Services Division OSD01 - Operational Services Division [0.00] $0.00 [0.00] ☐ 1080 - Operational Services Division Add New: [_____] 🔍 [0.0] $0.00 [0.0] ⓘ Dollar Limit set to 0 indicates no limit. [Save & Continue] [Reset] Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.	13. At the top of the page, select the contract Begin and End date using the calendar icon if not already done so on the Bid. The Cooperative Purchasing Allowed box should only be checked if multiple COMMBUYS organizations have access to view and use this MBPO. New contracts created in COMMBUYS are divided into two groups: • **Statewide / Designated Statewide**, which will be available for use to all eligible entities • **Limited User / Departmental Contracts**, which will be available for use by one (i.e. the issuing Department) or more eligible entities (either listed specifically in the RFR or defined generally in the RFR and then subject to authorization by the issuing Department) Contract type • **Statewide** – Only check Cooperative Purchasing and Add "All Org" if authorized by OSD or within the RFR language • **Limited User Departmental Contract/Multiple Organizations** – Check Cooperative Purchasing and Add one or more Organizations authorized to use the MBPO • **Limited User Departmental Contract/Single Organization** – Do not check Purchasing; this defaults to your organization only
Select **Organizaton ID** **Organization Name** ◉ ALL ORG Organization Umbrella Master Control ◉ 1000 Developmental Disabilities Council ◉ 1001 Attorney General's Office ◉ 1002 Department of Agricultural Resources ◉ 1003 Executive of Administration and Finance ◉ 1004 Appelate Tax Board	14. If cooperative purchasing is checked click the eyeglass icon to select Organization (you can only select one organization at a time). Check the radio box and click **Select** at the bottom of the page. Once selected the department will populate. Select the specific department. If cooperative purchasing is left unchecked, select the department(s) within your organization who will need to view and utilize this MBPO. Go to the **Summary tab**.

Screenshot	Directions
	15. The purchase order opens to the **Summary** tab and is currently in an 'In Progress' status. Scroll to the bottom of the page and click the **Submit for Approval** button.
	16. A popup message displays. Click **OK** to submit the purchase order for approval.
	17. Once the PO has been approved, it is ready to be sent to the vendor(s). Go to **PO > Ready to Send** in your Control center to send to vendors**.** Click the blue hyperlink **purchase order #** to open the PO.
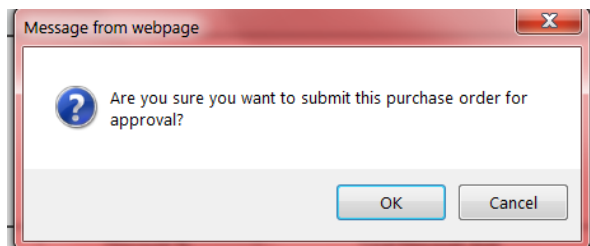
Screenshot	Directions
Vendor Notification Actions Option(s): ● Send Email and Notify Vendor ○ Set to Printed Status Save & Continue Cancel PO Clone PO Pr	18. The purchase order opens with a status of Ready to Send. Scroll to the bottom of the page. Select one of the two options: • **Send Email and Notify Vendor:** sends vendor's COMMBUYS contact an email about the PO and the PO can be found in COMMBUYS • **Set to Printed Status**: no email is sent but the Vendor will be able to find and open the PO in COMMBUYS Click the **Save & Continue** button to put the MBPO in a 'Sent' status**.**
Vendor Notification Result Subject: Purchase Order Notification - office supplies **Email Recipients** Delivery Date: 01/29/2014 02:20:15 PM 	**Vendor ID**	**Vendor Name**	
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00000006	Wiki's Widgets	Alyssa Arnold (linda.banks-grant@accenture.com) | OK	19. Confirm the email recipients and click the **OK** button.
Status: 3PS - Sent 📄	20. The Purchase order reopens to the **Summary** page with a Sent status. This means the MBPO has been sent to the vendor and the items/services on it can be found and ordered using a release requisition. To view the PO, go to the **Document Dropdown > PO > Sent** Alternatively, use the **Advanced Search** function (the magnifying glass) select Contract/Blankets document type, then enter the COMMBUYS PO number in the PO number field, or use any of the other open fields.